STEP ELEVEN

FOLLOW-UP and THANK

We've made the calls what's next?



ACTIONS!

Start the pledge follow-up system immediately

There's no time to waste. Run those credit cards and get those pledge cards in the mail (remember to include a return envelope, pre-stamped if your budget allows). Call back prospects whose questions couldn't be answered during the phonathon and send materials to prospects who wanted more information.

The second-day option

If you've scheduled a second calling day, confirm the details with all the key players. Remember to maintain the motivation by focusing on your mission, your goal and the concept of friends working together.

We've made the calls—what's next?

Thank absolutely everyone on your "extended" team

From your team leadership to your site custodians, everyone needs to be acknowledged and appreciated. In addition to volunteer caller awards, thank participants by sending letters from your board or executive director, by including their names in your newsletter and on your website, and by calling them in person. Remember to include:

- Volunteer leadership
- Staff leadership and support personnel
- Board member participants
- Volunteer callers
- Site donor
- Phone donors (if different)
- Food and refreshment donors
- Award, incentive and prize donors
- Site staff

Evaluate what went right and what went wrong

Gather your leadership team together and use the "In-House Evaluation" as a jumping-off point for discussion. You'll have a lot to talk about, especially if this was your first volunteer-led phonathon. What worked perfectly? What would you do differently next time? How can you best respond to the issues raised on the volunteer caller evaluations?



CONSIDER THIS...

Phonathon donor thank-you letters

Keep in mind that even though your pledge card says "thank you," it's not the same as an official thank-you letter. Send a thank-you letter within two days after receiving each pledge payment.

SUCCESS STRATEGY:

Report results

Send a written summary of your results to your board, staff, phonathon committee, and volunteer callers as soon as possible. If your phonathon was not tied to a specific mailing or event, it may take some time to get final numbers—especially if a lot of donors pledged by check. Some donors take their time, and others never respond at all.

After about three months, send another letter to your stakeholders reporting the final tally. And start planning your next fundraising phonathon!



Tools:

Use the following Tools to help you achieve your Successful Volunteer-led Phonathon:

In-House Evaluation

In-House Evaluation



Planning, organizing and calling—how did it go?

Discuss the following aspects, and others too, of your phonathon. What are your opinions on each of these topics? What changes might you make next time?

- The Calling Site: Calling area, ease of access, lighting, comfort, functionality, parking, safety, other
- The Timing: Choice of time of year and calling date, days and times, other
- The Refreshments: Quantity, quality, alternatives, other
- The Training Materials: Effectiveness, detail, easy-to-read, supportive, other
- The Mailing: Timely, helpful to donors, helpful to caller, other
- The Dialogue: Caller comments, effective, enough detail, applicable to all, other
- The Pledge Forms: Ease of completion, enough information provided, other
- The Follow-Up Mailing: Timely, response, other
- The Committee Process: Effectiveness, organization level, energy level, other
- Staff Support: Did callers and other volunteers feel well supported, other?
- The Funds Raised: Number of calls and pledges received, number of upgrades and amount raised per caller, by team and in total, other





Review the Step



Ready for the Next Step?

STEP ELEVEN

Overview:

ACTIONS!

- Start the pledge follow-up system immediately
- The second-day option
- Thank absolutely everyone on your "extended" team
- Evaluate what went right and what went wrong

CONSIDER THIS...

- Phonathon donor thank-you letters
- SUCCESS STRATEGY: Report results

TOOLS

In-House Evaluation

STEP ELEVEN



For more information, contact

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